

**RELEVATE**

LIFT | RAISE | LIGHTEN

# Case Study

Happy Paws – CRM | Inventory | Analytics |  
Creator | Marketing Automation



## THE CHALLENGE

Happy Paws, a community services organisation, relied on more than twenty different apps to manage participants, volunteers, and funding operations. This fragmented setup created inefficiencies, silos, and significant administrative overhead. Invoicing was particularly time-consuming, taking up to a week every fortnight and relying heavily on spreadsheets. Reporting and analytics were equally inefficient, with staff spending a full week every month producing PowerPoint and spreadsheet-based reports. Volunteer onboarding and compliance processes were disjointed, spread across multiple tools, and communications with participants and donors lacked automation. Happy Paws needed to consolidate its systems into a unified digital platform that could save staff time, improve compliance, and enable the organisation to focus on service delivery rather than administration.

## THE SOLUTION

Relevate transformed Happy Paws' operations by consolidating more than twenty separate applications into a customised Zoho One ecosystem. Zoho CRM became the central hub for participant onboarding, service agreements through Zoho Sign, and the management of donors and grants. Zoho Analytics introduced live dashboards that replaced manual spreadsheet reporting, giving the team real-time insights at the click of a button.

**Relevate helped us cut weeks of admin every month. With Zoho, we can focus more on supporting participants and volunteers instead of paperwork.**

**- Happy Paws**

Relevate also built tailored Zoho Creator applications, including an Incident Management App to track and resolve issues across sites, and a Volunteer Portal that digitised recruitment, compliance checks, training, and placement. With Zoho Marketing Automation and Zoho Survey, Happy Paws streamlined communications with participants and stakeholders. Finally, Relevate developed a bespoke attendance-based invoicing system, managed entirely within Zoho CRM and seamlessly integrated with Xero, which dramatically reduced processing time.

## THE OUTCOME

Happy Paws now operates on a centralised Zoho One ecosystem that has transformed both efficiency and service delivery. Real-time dashboards have eliminated the need for manual reporting, saving the organisation around a week every month. Invoicing, once a complex and time-consuming process, has been reduced from a full week every fortnight to just two hours weekly. By consolidating more than twenty different applications into a handful of integrated Zoho tools, Happy Paws has streamlined volunteer onboarding, improved compliance tracking, and strengthened communication with participants and donors. With ongoing support from Relevate, they are well-positioned for sustainable growth and greater community impact.



**Customised CRM**



**Volunteer  
Management**



**Analytics  
Dashboards**



**Automated  
Invoicing**

**This project demonstrates how Relevate helped Happy Paws consolidate over twenty disconnected apps into a unified Zoho solution. By automating invoicing, digitising volunteer onboarding, and replacing manual reporting with live dashboards, Relevate saved the organisation weeks of administrative time every month. The result is a scalable digital system that empowers staff, improves compliance, and allows Happy Paws to focus on their mission of community care.**



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